



WEEKLY NEWS BRIEF



CPAMAIL@TXCPAHOUSTON.CPA



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April 11, 2024

Spotlight Feature

Last Chance!

Dive Deep into Wealth Management and ESG with Expert Insight

April 17-18 | Hybrid Event | In-Person at TXCPA Houston Training Facility
Up to 4 CPE Hours for Both Days

It's time to improve your knowledge of wealth management and Environmental, Social, and Governance (ESG) principles. Join others who want to be enlightened at a two-day event featuring presentations and conversations led by industry experts.

Day 1: April 17 - Wealth Management

Speaker: **Ryan Firth**, CPA, Financial Planner at Mercer Street Personal Financial Services

On Day 1, Ryan Firth will guide attendees through the intricacies of wealth management. Learn invaluable strategies for growing and safeguarding your wealth at various stages of your career and into retirement.

Learn more about:

- How to make saving (and spending) less taxing
- The pros and cons of do-it-yourself investing versus hiring a professional to manage your wealth
- Why CPAs are well-positioned to help clients with matters beyond just tax preparation and accounting

Day 2: April 18th - ESG

Panelists: **Dr. Michael Kraten**, CPA, Director of Accounting Program Initiatives at the University of Houston; **Uju Akaegbobi**, Senior Manager, Department of Professional Practice at KPMG; and **Todd Smurl**, CFA, Founder, Integrity Financial Planning

On Day 2, the spotlight shifts to ESG considerations. Join our esteemed panelists for an insightful discussion on integrating ESG principles into financial decision-making processes.

Learn more about:

- What data is measured for reporting purposes
- How and why public accounting firms perform assurance activities on that data
- How the financial community uses the data for investment purposes

Each day offers up to 2 CPE credits. **Sign up for the two-day bundle to register at a discounted rate.**

Note: This event will be held in-person at the TXCPA Houston office and offers the best experience. Virtual attendance options are available. **In-person attendees will be eligible for an exclusive door prize!**

[Registration Options](#)

New Complimentary Webinar for Members Corporate Transparency Act - Compliance Questions Answered

Tues., May 28 or Fri., June 21 | Noon - 1 p.m.
Presenter: Jim Dossey, MBA, CPA
Virtual | Complimentary for Members;
\$10 for Non-Members

After the Corporate Transparency Act went into effect on January 1, 2024, FinCEN estimated that 33 million businesses must file BOI reports in 2024. Join this webinar to learn essential details about who the CTA applies to, what information is required, how to comply, and how to prepare in case of non-compliance.

Can't join on May 28? Jim Dossey will repeat this session on June 21. Choose the best date for your schedule.

[Register for May 28](#)

[Register for June 21](#)

New Professional Development Program Techniques for Dynamic Delivery Hosted by TXCPA Houston Young Professionals Committee

April 24 | 5 - 7 p.m. | In Person
Presenter: Stacy Harris | 1 CPE

International speaker **Stacy Harris** will lead this in-person workshop to crush stage fright, master body language and equip you with practical strategies for every speaking opportunity. Discover the mindset shifts to conquer nerves and radiate genuine poise.

[Register Here](#)

New Complimentary Webinar for Members Tackling Toxicity from the Inside Out

Tues., May. 10 | Noon - 1 p.m. | Virtual
Presenter: Kimberly J Benoit, ACC, PMP
Complimentary for Members; \$10 for Non-Members

Kimberly J. Benoit, ACC, PMP, will cover tough topics such as dysfunctional mistakes leaders can make, and how to gain the insight to show up differently. In this insightful presentation, Kimberly will guide you through the judgment-free, often humorous, and always enlightening process to find more fulfillment in your role - transforming your leadership, your team – and ultimately, your organization.

[Register Here](#)

Student Auxiliary Virtual Panel Discussion Deep in the Heart of TAXES

Fri., April 26 | 6:00 – 7:30 p.m. | Virtual

Join Student Auxiliary and PwC, one of the nation's leading Big Four accounting firms, for a virtual panel discussion featuring tax professionals. Delve into state and federal tax practices, gaining invaluable insights into the intricate and exciting world of taxation.

[Register Here](#)

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Upcoming Events

Social and Networking

May 4

Volunteer Day at Houston Pets Alive! | [Registration for Adults](#); [Registration for members bringing guests under 18 years of age](#)

May 23

TXCPA HOUSTON Member Recognition Awards Banquet | [Member & Guest Registration](#) | [Award Recipient Registration](#)

CPE

April 17-18

Deep Drive Presentation + Conversation: Wealth Management and ESG [Registration options](#) | **Last Chance!**

April 23

Introduction to Forensics Workshop (in person) | [Student Registration](#) | [Non-Student Registration](#)

April 24

Techniques for Dynamic Delivery Hosted by TXCPA Houston Young Professionals Committee | [Register](#)

May 10

Tackling Toxicity from the Inside Out webinar | [Register](#)

Multiple Dates

[Goodman Financial](#) Seminars (in person and virtual) | [View schedule](#)

May 21-22

2024 Spring Accounting Expo (in person) | [Registration options](#)

May 22

Spring Accounting Expo Spotlight Session: Accounting in the Healthcare World
Scroll down for details | [Registration options](#)

May 28

Corporate Transparency Act - Compliance Questions Answered webinar | [Register](#)

June 14

FASB's Proposed DISE ASU webinar | [Register](#)

June 21

Corporate Transparency Act - Compliance Questions Answered webinar | [Register](#)

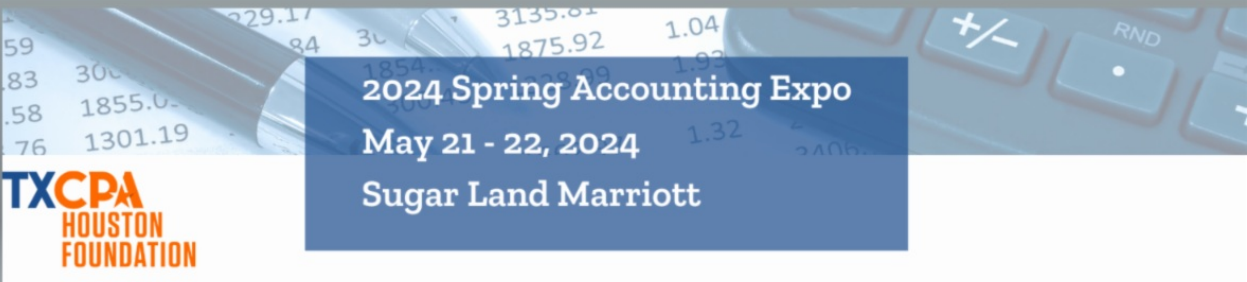
July 12

Point Solutions for Your Employee Benefits Program webinar | [Register](#)

Multiple Dates

Excel-based CPE with [Flat Fee Consulting](#) | [Explore sessions](#)

SPRING ACCOUNTING EXPO SPOTLIGHT SESSION



Spring Accounting Expo
Registration Options

Accounting in the Healthcare World
May 21-22 | In Person Event | Sugar Land Marriott
Sugar Land | Up to 20 CPE Hours

Applying general accounting standards properly can be an overwhelming task, but adding in industry specific nuances



only adds additional challenges. This session will cover some of the major accounting issues that uniquely affect the healthcare industry. **Anna Stevens, CPA, CHFP**, Partner-in-Charge, Health Care Services with Weaver, will cover a wide range of topics from compliance issues to recipients of federal funds and many things in between, at her Spring Accounting Expo's Day Two breakout session on May 22.

Watch for more Spring Accounting Expo spotlight features in upcoming issues of *Weekly News*. Sessions will cover topics such as: being a board member, mentorship, AI in Forensic Accounting, and many more topics that will help you and your business thrive!

Member Resources and Deadlines

For All Members

April 25

Deadline to nominate members for TXCPA awards | [Make a nomination online](#)

Events

[View all upcoming events](#)

Current News

[IRS News](#)

Career Center

Post or seek job openings; enter code HOUSTONCHAPTER | [Employers](#) | [Job Seekers](#)

Podcasts

Professionals share information with TXCPA HOUSTON members | [Browse episodes](#)

CCH
Publications

Exclusive discounts on Wolters Kluwer CCH publications | [Browse publications](#)

Ongoing

[Check your member profile](#) | Assistance: (800) 428-0272 option 1

For Students and Candidates

April 23

Introduction to Forensics Workshop (in person) | [Student Registration](#) | [Non-Student Registration](#)

April 26

Deep In the Heart of Taxes: Student Auxiliary Program (Now virtual) | [Registration](#)

Various Dates

TXCPA HOUSTON Candidate Study Hall | Email [Kristie Ondracek](#) for details

Student
Leadership

Apply for a Student Auxiliary Officer position | [Application Instructions](#)

Free Resources

[Student and candidate resources](#) and [Student Membership](#)

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TXCPA Houston's Diversity Statement

TXCPA Houston values the diverse contributions and talents of all its members. We are committed to promoting diversity, equity, inclusion, and a sense of belonging in the workplace, in membership, and in the accounting profession. Diversity includes, but is not limited to, race, gender, generations, abilities, orientation, and religious beliefs.

Contact [Mark Allen](#), TXCPA Houston Executive Director, to learn more about joining the Diversity & Inclusion Committee.

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